



St Monica Trust

Strategic Plan

SUMMARY 2019

Welcome to the 2019 strategic plan objectives.

As we enter the penultimate year of the Trust's five-year strategic plan, it's important that we continue to build on all that we have achieved over the previous three years.

The opening of The Chocolate Quarter and our work with the Channel 4 show, *Old People's Home for 4 Year Olds* has seen the Trust receive national recognition as a leader in community integration. Meanwhile our customer services have been rated 'world-class' by Hospitality Assured and the outstanding contribution of staff teams across the Trust has been recognised by the health and social care industry with numerous awards.

That said, we still need to concentrate on the basics and over the next two years we will embed practices into our everyday processes that make it even easier for people to come and live with us or access our services.

We're a growing organisation and 2019 will see the confirmation of our plans for the DEFRA site at Westbury Fields, plus other development opportunities coming to fruition. In order for the Trust to grow we need to have a strong executive structure in place. The recent appointment of the Trust's first ever Chief Operating Officer will help ensure that the Trust's growth and development doesn't distract us from delivering the high quality services the Trust provides on a day-to-day basis.

The new post will create a strong and robust management structure in the executive team. This is a structure that has worked successfully in other organisations that have experienced similar levels of growth in a relatively short space of time.

Since 1920, the Trust has always been there to help older people across the region and that's not a responsibility to be taken lightly. More than ever, it's very important that we continue to deliver maximum value for the resources we have. Every decision we make in terms of the resources we use will have an impact in terms of the outcomes we achieve for older people in Bristol. We must ensure that we get every last penny of value out of what we're spending.

As a not-for-profit organisation, the savings we make do not go into the pockets of shareholders. Every single penny we save, helps us to help even more people. The Trust's Community Fund now issues more than £500,000 every year in individual grant giving and supporting groups who provide vital services for older people in Bristol. The Trust is now the largest single provider of funding for older people in Bristol and by the end of the five year strategy, the Community Fund will be administering a budget of more than £1 million, which will make an even bigger difference to the lives of older people.

The Trust is ahead of so many of its competitors in the care sector because we are tailoring our homes and services to a new generation of retirees. We've already seen the age range of our residents drop at



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The Chocolate Quarter, but there is now a need to get our offering right across all our sites and services to meet our customers' requirements.

The completion of the current five-year strategy will see us through significant change in the care sector. I am sure there will be further change over the next five years and beyond. Change is part of our DNA and, as the charity approaches its 100th anniversary, it's more important than ever that we recognise the need for change and embrace it.

David Williams
Chief Executive

2018 IN NUMBERS

Training Journal Awards
Best Operational Programme

Cateys
Healthcare Caterer
of the Year Award

Hospitality Assured
20th Anniversary Award

3rd Sector Care Awards
Making a Difference Award

Bath Property Awards
Residential Development Award

RoSPA
Gold Award

Waste2Zero
Food Redistribution Award



Finance

Savings on resources

£78,000

Turnover

£38 million

Properties enhanced

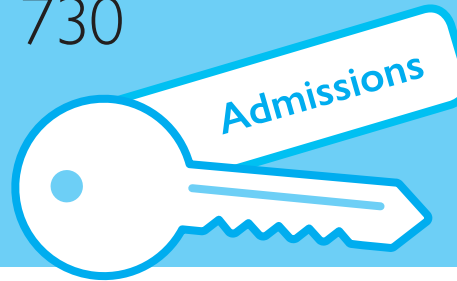
81

Apartments sold

90

Care home admissions

730



Community

Community interactions at
The Chocolate Quarter

37,000

People engaged by community
development teams

1,300

Community Fund spend

£542,401

Support



People we've helped

3,040

People financially supported

1,737

Volunteer hours

33,072

New staff attending
induction training

318

Staff attending
Family Fun Day

903



Online

Website visits

222,534

Miscellaneous

EHO

5-star Food Hygiene Rating

Hospitality Assured score

85.2%

Best in Care Sector

We are St Monica Trust



Our Values

Our values are at the heart of the St Monica Trust and help us shape our everyday actions and behaviours. Our six core values are lived and owned by everyone who lives, works and has a relationship with the St Monica Trust.

We are people people

We build communities for life where everyone can contribute. We create environments and services in which people are valued, included and respected.

We are caring

Our legacy of compassion remains our central focus. We care about everything that affects people's lives.

We are responsive

We adapt to changing times and individual needs. We offer choice and take every opportunity to improve and enrich people's lives.

We are honest

We are open, we communicate clearly, we ask questions and we listen so that everyone's voice is heard.

We are inspirational

We continuously learn, innovate, grow and improve. We influence excellence in our field.

We are dedicated

We are proud to commit our charitable resources to get the best results possible for residents, customers and the wider community.



St Monica Trust

www.stmonicastrust.org.uk

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STRATEGIC AIM 1

For our customers

5 YEAR OBJECTIVES

- 1.1 We will attract new residents and customers and retain and deepen our relationship with those we already have.
- 1.2 We will deal honestly with our residents and customers, understanding their perspective and secure their loyalty and trust by providing outstanding choice, value and service.
- 1.3 We will partner with residents and customers, offering them a real voice in both the service they receive and the future development of the Trust.
- 1.4 We will be actively involved in the building and maintenance of supportive and enriching communities.

2019 ACTIONS

We will develop an internal quality system and processes to help our care services achieve "Good" and "Outstanding" in CQC ratings.

We will continue to devolve decision-making powers to the villages by rolling out village councils and continuing the development of the Site Executive Teams across all sites.

We will invest £1.5 million in 2019 for the continued enhancement programme across our sites.

We will direct resources to implementing technologies that will enhance the day-to-day experience for residents and customers.

We will use the "What matters to you" initiative to identify the resources needed to support residents and customers.

We will build on our local and national reputation for being a leader in community integration projects.

We will explore the implementation of more flexible financial options for residents within our villages.

We will commence work on defining the Trust's model for dementia-friendly communities.

STRATEGIC AIM 3

For our business

5 YEAR OBJECTIVES

- 3.1 We will continue to ensure sustainable financial planning.
- 3.2 We will ensure that the financial strategy supports the maintenance of facilities and resources.
- 3.3 We will continue to improve our estate and infrastructure.

2019 ACTIONS

We will be looking to maintain good and outstanding quality services across the Trust, whilst achieving £240,000 savings to improve the financial performance of the Trust.

We will further develop our business planning and review processes for new developments and service expansion.

We will publish how the Trust's charitable subsidy is spent and measure how this benefits our residents, customers and the wider community.*

We will review our business continuity plan to ensure that we have contingency plans in place to respond to a Brexit worst-case scenario.

We will demonstrate through benchmarking that we are maximising the use of our charitable financial resources.

We will publish a Trust-wide sustainability strategy.

Our electronic staff rostering system will be standardised before the end of 2019 across all operations in order to plan staff resources.

We will explore the development of specialist procurement to ensure that we realise maximum value for money on our purchases.

*Our charitable subsidy is the money that comes from the Trust's investments, which were gifted to the Trust on its foundation. We have to use our charitable support to best effect and we do this by assisting residents financially by more than £4 million annually. We also provide a further £800,000 to help people in the wider community. Any remaining income is used to improve and maintain facilities and services.

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St Monica Trust

STRATEGIC AIM 2

For our colleagues

5 YEAR OBJECTIVES

- 2.1 We will ensure that everyone working for the Trust has the right and the opportunity to have their voice heard. This will allow the Trust to make decisions for the benefit of the Trust as a whole.
- 2.2 We will continue to make people's jobs more satisfying through a wide selection of employee benefits, opportunities to increase knowledge and increased staff empowerment in the running of our communities and services.
- 2.3 We will make it easy for the right people to join our team and will actively attract and recruit people who share our values.
- 2.4 We will retain existing staff through the creation of a working environment where no one person is more important than another, in which on-the-job innovation and learning is prized, and the contribution of colleagues is valued and recognised.

2019 ACTIONS

We will continue to create a great place to work by developing and supporting leaders and aspiring leaders to behave in a way that aligns with our vision and values.

We will attract more people with the right skills and values by improving the candidate journey and offering opportunities for young people to start their career.

We will continue to review our structures and job roles in order to make the best use of the skills we have available and to ensure that people have the opportunity to develop within the organisation.

We will explore more flexible systems of bank working in order to promote a consistent experience for our customers, offer flexible working and reduce the Trust's reliance on agency.

We will increase colleague engagement by communicating and celebrating the unique contribution we make in improving the lives of older people in communities across the region.

We will support colleagues' working lives by enhancing their ability to take advantage of the Trust's existing technology.

STRATEGIC AIM 4

For our growth

5 YEAR OBJECTIVES

- 4.1 We will develop a five-year proactive sustainable growth strategy for the organisation.
- 4.2 We want to position the organisation as a local and national influencer in terms of the provision of services for older people.
- 4.3 We will develop a five-year strategy for increasing the Trust's impact on the well-being of disadvantaged older people living in Bristol and the surrounding areas.
- 4.4 We will develop and enhance our use of technology across the organisation to improve customer and staff experience.

2019 ACTIONS

In 2019, we will involve stakeholders in the development of a finalised plan for the land at Westbury Fields.

We will implement the Community Impact Strategy that brings together the Community Development Team and the Community Fund and increase the Community Fund allocation to £800,000.*

We will open a St Monica Trust health and social care academy in the Keynsham area in 2019.

In 2019 we will explore land purchases for expansion opportunities attached to existing sites.

Together we will review our organisational structures to ensure that they provide a firm foundation for future growth of the Trust.

We will invest in delivering essential technology infrastructure across the Trust and introduce automation technologies to help increase efficiencies.

We will publish our plan for how we use research to improve the lives of older people within our villages, local communities and nationally.

We will start the implementation of our plans to enhance and promote the Trust's brand.

*The Trust's Community Fund and Community Development teams work with organisations and individuals to improve the well-being of older people in Bristol and the surrounding area. This is achieved through the distribution of gifts and grants through the Trust's Community Fund and partnerships with other organisations.